UNASSIGNED CASES IN CARE

CAN'T FIND A CARE CLIENT FILE THAT YOU HAVE CONVERTED FROM THE LEGACY CA?

Either you forgot to assign yourself as the **Primary Case Manager** when you switched an existing client from Legacy to CARE, or your Supervisor forgot to do this on a new case from HCS. Please do not create another client file. Here's what to do:

Open the ACTION menu.
Select Client Management. You should now see the SEARCH screen.

You will note a box labeled **"Unassigned cases for the office I'm logged into."**
Click in this box to enable the SEARCH button.

Click the SEARCH button.
Review the list of names and identify any client names that belong to you.
Be prepared to see a long list of clients as this screen includes transfer cases from HCS who have not yet been assigned. Remember you can alphabetize this list by double clicking in the heading for each column e.g. (Last Name).

Highlight the row of the client belonging to you, and click the VIEW button at the bottom of the screen. *Note: although unlikely, if you still don't find your client, click the Search Criteria tab and search in all offices. If your client still is not showing up, then this client was not actually added to CARE.*

The name of the person you selected will now be in the navigation tree (online status)

Double click the name of the client you are viewing

Click CLIENT DETAILS to expand the screens

Click the OVERVIEW screen

Open the CASE WORKER bucket. You should now be viewing the open bucket with names of all staff in your office on the left, and your name on the right.

Click the down arrow for **PRIMARY CASE MANAGER** and select your name. A blue 'blotch' will appear next to your name.
Make sure that your team supervisor and team nurse have been selected.
When you have all the appropriate team members on the SELECTED side of the bucket, and you are identified as the primary case manager, click OK.

Before leaving the OVERVIEW screen check again to make sure that the "BLUE BLOTCH" is by your name in the CASE worker bucket.

You can now remove the client from view to CHECK OUT, etc.